



## MEETING MINUTES

**Meeting Date/Time:** June 13, 1:30pm – 3:00pm

**Location:** USDA, 1400 Independence Ave, SW, 1st Floor, Room 1052(c) and Dial-in

### **Agenda:**

1. Mentoring Program Update
2. Records Schedule Update
3. COFO Conference Update
4. Discussion Topics
5. Announcements

### **Highlights:**

#### **1. Mentoring Program Update**

- a. The purpose of the program is to promote best practices and encourage cross-fertilization amongst COFO members and their organizations. Mentoring committee is seeking
- b. Some key parameters –
  - i. Mentors will be serving a two year term under COFO. Mentees should be practicing ombuds for a minimum of one year.
  - ii. Applicants to both positions will apply to a mentoring committee for acceptance. Please contact COFO Executive Committee and/or Paul Sotoudeh if you are interested in joining the committee ([Paul.Sotoudeh@uspto.gov](mailto:Paul.Sotoudeh@uspto.gov)).
  - iii. If you have any questions regarding the concept document, which is currently in draft form, please contact Mollie Berg ([Mary.a.Berg@nga.gov](mailto:Mary.a.Berg@nga.gov)), Guy Weber ([Guy.J.Weber@nga.gov](mailto:Guy.J.Weber@nga.gov)) or Paul Sotoudeh ([Paul.Sotoudeh@uspto.gov](mailto:Paul.Sotoudeh@uspto.gov)).

#### **2. Records Schedule Update**

- a. The committee is expected to meet next week to discuss strategy and way forward.
- b. The concept document is in draft form. Please contact the COFO Executive Committee if you have any questions (Paul Sotoudeh, Mollie Berg, and/or Guy Weber).

#### **3. COFO Annual Conference Update**

- a. The COFO Annual Conference will be held at the US Patent and Trademark Office (Alexandria, VA) on Friday, October 12, 2018.
- b. Conference committee met on June 6, 2018 to discuss the major buckets of the conference, including logistics and content. With each of the areas, the committee was able to tentatively agree on roles and responsibilities.

- c. Conference committee would like your input on potential topics and speakers. Please contact Tyler Smith ([Tyler.Smith@nih.gov](mailto:Tyler.Smith@nih.gov)) and Bina Patel ([Bina.M.Patel.Civ@mail.mil](mailto:Bina.M.Patel.Civ@mail.mil)) with your suggestions.

#### 4. Discussion Topic:

- a. Ombudsman as Trainer – Do you offer training to the agencies you ombuds or, for externally-facing ombuds, your stakeholders? If so, on what do you conduct training, and how do you socialize its availability to the target audience? Any special considerations when either publicizing or delivering the training to maintain an independent posture and differentiate your program from your agency?
  - i. Suggestions/Recommendations from COFO members:
    1. The Ombudsman training differs in each agency. Ombudsman are offering training to internally and externally stakeholders. Internally, training may be in partnership with other departments, or conducted only in the Ombudsman function.
    2. Topics for trainings range from Myers Briggs, Crucial Conversations to Conflict Resolution 101. Materials for the trainings are created independently by Ombudsman.
    3. Members of COFO also shared logistical options. Some agencies independently conduct logistics, while others are routed through the training departments.
    4. In some agencies, training does serve as an effective tool to advertise the Ombudsman function, despite conducting training in partnership with internal groups such as EEO/Training Office.

#### 5. Announcements

- a. ROI Institute will be hosting a 5 day training, “Measuring the ROI of Soft Skills” from August 20-24, 2018 in Washington D.C. The purpose of the training is to show value in soft skills through metrics and ROI. The training will be followed by a capstone study on how to build metrics and speak to stakeholders. All requirements must be met to earn the ROI certification. The audience for this training includes ADR and Ombuds practitioners, coaches and facilitators. The cost of the training is \$2500. Please contact Vikram Kapoor at FEMA for more information ([Vikram.Kapoor@fema.dhs.gov](mailto:Vikram.Kapoor@fema.dhs.gov)) or ROI Institute ([Terry@roiinstitute.net](mailto:Terry@roiinstitute.net)).

**Attendees:**

**In-Person**

Berg, Mollie -National Geospatial-Intelligence Agency  
Gordon, Laurel – Department of Justice  
Levine, Lisa – Department of Justice  
Marx, Lauren – Chi Associates  
Maurer, Bill – Department of Energy  
Sotoudeh, Paul – United States Patent and Trademark Office

**Call-In**

Achuko, Devara – Department of Homeland Security  
Balick, Howard – Department of Health and Human Services  
Barrera, Michael – SBA Office of Disaster Assistance  
Bedlevy, Dawn – National Security Agency  
Bunns, Felicia – Department of Energy  
Dodson, Shireen – US State Department  
Donnelly, Wanda – US State Department  
Epps, Ayanna – Federal Deposit Insurance Corporation  
Harley, Jasmine – National Credit Union Administration  
Heffernan, Claire – Transportation Security Administration  
Kapoor, Vikram – Department of Homeland Security  
Ladell, Natalie- US State Department  
Larkins, Marcia – Department of Health and Human Services  
Lewis, Kimberly Day – FLETC, Department of Homeland Security  
Lukham, Stephanie – Department of Homeland Security  
Manderson, Katie – Texas State Department  
McGuire, Carrie – Office of Government Information Services  
Merrix, Celeste – Department of Homeland Security  
Michael, David – Department of Health and Human Services  
Milner, Heather – Consumer Financial Protection Bureau  
Morey, Chauncenette – Department of Justice  
Patel, Bina – National Ground Intelligence Center  
Rogers, Joan- Environmental Protection Agency  
Smith, Tyler – Department of Health and Human Services  
Webb, Jackie – United States Patent and Trademark Office  
Weber, Guy - National Geospatial-Intelligence Agency  
Wolfe, Lexi –Transportation Security Administration  
Wright, Donald – US Department of Agriculture  
Zeller, Jessica – Department of Health and Human Services  
Zrubek, Tom – Department of Defense